

Meeting Minutes

CBP Strategy Kickoff with COR

08/28/2018 – 02:30 -3:30PM

Location: Audio Conference

Meeting Leader: (b) (6), (b) (7)(C) (McKinsey) and (b) (6), (b) (7)(C) (CBP)

Notetaker: (b) (6), (b) (7)(C)

Attendees

(b) (6), (b) (7)(C) (McK), (b) (6), (b) (7)(C) (McK), (b) (6), (b) (7)(C) (McK), (b) (6), (b) (7)(C) (McK), (b) (6), (b) (7)(C) (CBP), (b) (6), (b) (7)(C) (CBP)

Key Discussion Items

- McKinsey has sole responsibility of reporting and ensuring COR is included on all invites and meetings
- All team members must have full OPR clearance and sponsored badges
- Anyone without OPR clearance cannot be working on the project
- McKinsey is to work only on deliverables in the task order
- Briefing materials are to be shared with COR and Program Manager
- McKinsey will discuss travel and site visit plans with COR and Program Manager
- Expectations of COR for McKinsey: Weekly and monthly reports of meetings (time, date, and attendees) and deliverables progress (monthly reports starting Sept 5th)
- Expectation of the Commissioner is to create a plan that allows him to share his vision with all employees/offices in CBP
- Phase 1: Create: Finalize a set of objectives/ initiatives
- Phase 2: Codify: Develop a messaging framework and focus on communications effort and portfolio of initiatives
- Phase 3: Launch: Deliver final strategic plan along with communications model and implantation plan
- Phase 4: Support: Follow up and possible needed revisions

Action Items

Action Item	Due Date	Responsible
Send COR a list of the clearance details of each team member	09/5/2018	(b) (6), (b) (7)(C)
Minutes from Kickoff	09/5/2018	(b) (6), (b) (7)(C)

WEEKLY STATUS REPORT - Week Ending Aug 31, 2017

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: August 28, 2018

Title/Topic: Kickoff meeting with COR

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on project timeline, background investigation and how we would work together

Date: August 29, 2018

Title/Topic: Working team pre-meeting

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on proposed working team kickoff timing and potential team members

Date: August 30, 2018

Title/Topic: Project timeline

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on ALC, DLC and working team cadence to produce final strategy

2. Activities conducted this week

- Kicked off project with COR
- Aligned with Program Manager and COR on project execution plan
- Scheduled DLC and working team kickoffs

3. Planned meetings for next week

Date: September 5, 2018

Title/Topic: Strategy kickoff – Deputy Leadership Council

Date: September 6, 2018

Title/Topic: Working team kickoff

4. Planned activities/objectives for next week

- Kickoff working team
- Kickoff Deputy Leadership Council engagement
- Draft Strategic Objective Outcomes
- Draft materials for ALC meeting on September 10 (Outcomes)
- Schedule 1:1s with EACs and DEACs

5. Potential issues/risks to flag

- Clearances: lack of provisional clearances/ NDAs limit team member availability
- Badging: (b) (6), (b) (7)(C) are cleared but awaiting badging
- Team room: no space confirmed

6. Planned leave

- ...

WEEKLY STATUS REPORT - Week Ending September 07

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: September 5, 2018

Title/Topic: Deputies Leadership Council

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on overall timing to produce final strategy and developed initial view of outcomes for the strategic objectives

Date: September 6, 2018

Title/Topic: Strategy Working Team Kickoff

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on ALC, DLC and working team cadence to produce final strategy

2. Activities conducted this week

- Kicked off working team
- Kicked off Deputy Leadership Council engagement
- Developed an initial view of outcomes for Strategic Objectives
- Amended Aspiration
- Drafted agendas for upcoming ALC and Leadership Offsites
- Scheduled 1:1s with EACs and DEACs

3. Planned meetings for next week

Date: September 11, 2018

Title/Topic: Weekly Project Check-in w/ (b) (6), (b) (7)(C)

Date: September 12, 2018

Title/Topic: Strategic Plan Interview w/ (b) (6), (b) (7)(C)

Date: September 12, 2018

Title/Topic: Strategic Plan Interview w/ (b) (6), (b) (7)(C)

Date: September 12, 2018

Title/Topic: Strategy Working Team

4. Planned activities/objectives for next week

- Build the fact base/baseline from public information and select operational data
- Identify public and private sector best practices cases
- Determine ongoing and planned initiatives through FY19 Priorities and current component strategic plans
- Draft potential outcomes and choices for DLC consideration

5. Potential issues/risks to flag

- Clearances: lack of provisional clearances/ NDAs limit team member availability

- Badging: (b) (6), (b) (7)(C) are cleared but awaiting badging
- Team room: no space confirmed

6. Planned leave

- ...

WEEKLY STATUS REPORT - Week Ending September 14

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: September 12, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned COO's top three priorities – hiring, IT modernization and data analytics

Date: September 12, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned (b) (6), (b) (7)(C) top priorities – mobility, technology, ports/check point collaboration; (b) (7)(E)

Date: September 12, 2018

Title/Topic: Strategy Working Team Kickoff

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Brainstormed strategic initiatives and reviewed deep dive into workforce

Date: September 13, 2018

Title/Topic: DLC and ALC agendas

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan for DLC and future ALC agendas

2. Activities conducted this week

- Drafted portfolio of initiatives for mission areas and strategic objectives with first cut at outcomes
- Completed deep dive on workforce baseline, best practice and recommendations
- Drafted deep dive on technology baseline, best practice and recommendations

3. Planned meetings for next week

Date: September 18, 2018

Title/Topic: Weekly Project Check-in w/ (b) (6), (b) (7)(C)

Date: September 18, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Date: September 18, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C) and DEAC (b) (6), (b) (7)(C)

Date: September 19, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Date: September 19, 2018

Title/Topic: Interview with DEAC (b) (6), (b) (7)(C)

Date: September 19, 2018

Title/Topic: MTG with Strategy Working Team

Date: September 19, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- Refine portfolio of initiatives and pressure tested outcomes
- Complete deep dive on technology baseline (for review at ALC along with workforce deep dive), best practice and recommendations
- Draft stakeholder experience, partnerships and one CBP baseline, best practice and recommendations

5. Potential issues/risks to flag

- Clearances: Team members awaiting clearances (b) (6), (b) (7)(C) limits ability to complete tasks. Requirements for complete BI and inability to use a provisional clearance may also inhibit engagement from Ogilvy partners, who already work with CBP but are not required to have a completed BI. Their paperwork has been submitted, but are awaiting clearance.
- Badging: (b) (6), (b) (7)(C) is cleared but awaiting badging

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending September 21

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: September 18, 2018

Title/Topic: Weekly Project Check-in

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Align on plan for the week and C1 meeting

Date: September 18, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on potential strategic initiatives

Date: September 18, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C) and DEAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on potential strategic initiatives

Date: September 18, 2018

Title/Topic: Meeting with C1

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received guidance on overall framing for strategy effort and potential strategic initiatives

Date: September 19, 2018

Title/Topic: Interview with DEAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on potential strategic initiatives

Date: September 19, 2018

Title/Topic: Strategy Working Team

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on potential strategic initiatives

Date: September 19, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on potential strategic initiatives

Date: September 20, 2018

Title/Topic: Interview with Executive Director (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned about challenges with HR in Border Patrol

Date: September 20, 2018

Title/Topic: Interview with Deputy Chief Law Enforcement Directorate (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Gained feedback on future state of domain awareness and common operating picture

Date: September 20, 2018

Title/Topic: Interview with Advisor to the Commissioner on Trade (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned about Ecommerce strategy

Date: September 20, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on overall strategy framing after feedback from C1

Date: September 20, 2018

Title/Topic: Interview with Executive Director (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned about efficiencies of larger AORs and collaboration between AMO and BP

2. Activities conducted this week

- Refined potential initiatives and outcomes through interviews
- Aligned on agenda for October 1 ALC and October 11 offsite
- Created fact packs for Workforce, IT, Stakeholder Experience and Border Security

3. Planned meetings for next week

Monday 9/24

1:00-1:30pm Interview with (b) (6), (b) (7)(C)

2:00-3:00pm Interview with EAC (b) (6), (b) (7)(C)

3:30-4:30pm Interview with Deputy Commissioner (b) (6), (b) (7)(C)

Tuesday 9/25

9:30-10:00am Project check-in

11:30-12:00pm Interview with (b) (6), (b) (7)(C)

2:00-2:30pm Interview with (b) (6), (b) (7)(C)

Wednesday 9/26

11:00-12:00pm Interview with (b) (6), (b) (7)(C)

1:00-1:30pm Interview with (b) (6), (b) (7)(C)

1:30-2:00pm Interview with (b) (6), (b) (7)(C)

2:00-4:00pm Working Team meeting

Thursday 9/27

10:00-10:30am Interview with (b) (6), (b) (7)(C)

12:00-1:00pm Interview with (b) (6), (b) (7)(C)

3:30-4:00pm Interview with (b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- Add baseline and target to potential initiatives
- Create 2-pager initiative pack of external trends, internal baseline and initiative description (outcome, owner, phases, challenges)
- Develop criteria for decision making to include initiative on the Portfolio of Initiatives
- Complete materials for October 1 ALC discussion

5. Potential issues/risks to flag

- Clearances: Requirements for complete BI and inability to use a provisional clearance may inhibit engagement from Ogilvy partners, who already work with CBP but are not required to have a completed BI on their other contract. Their paperwork has been submitted, but are awaiting clearance.
- Badging: (b) (6), (b) (7)(C) is cleared but awaiting badging

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending September 28

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: September 24, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 24, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 24, 2018

Title/Topic: Interview with Deputy Commissioner (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 25, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 26, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 26, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined content for upcoming ALC and meeting with C1

Date: September 26, 2018

Title/Topic: Interview with Executive Director (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 26, 2018

Title/Topic: Strategy Working Team Meeting

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined details of potential strategic initiatives

Date: September 27, 2018

Title/Topic: Interview with Executive Director (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 27, 2018

Title/Topic: Interview with Executive Director of USBP Strategic Planning and Analysis Directorate

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 27, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

Date: September 27, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined list of potential strategic initiatives

2. Activities conducted this week

- Refined potential initiatives and outcomes with Agency leadership and working team
- Created and vetted 2-page synopses for each initiative with working team
- Developed criteria for decision making to include initiative on the Portfolio of Initiatives
- Prepared for October 1 ALC meeting

3. Planned meetings for next week

Monday 10/1

1:30-2:30pm Agency Leadership Council

Tuesday 10/2

9:30-10:00am Project Check-in

Wednesday 10/3

1:00-1:30pm Interview with (b) (6), (b) (7)(C) ED Policy Directorate / Office of the Commissioner

2:00-4:00pm Working Team MTG

Thursday 10/4

10:00-11:00am Interview with (b) (6), (b) (7)(C) Deputy Executive Assistant Commissioner, Office of Trade

11:30-12:00pm Interview with Assistant Commissioner (b) (6), (b) (7)(C) Office of Information and Technology

1:00-2:00pm Interview with Deputy Assistant Commissioner (b) (6), (b) (7)(C) Office of Information and Technology

4. Planned activities/objectives for next week

- Refine baselines, outcomes and phases for prioritized group of initiatives
- Begin drafting strategy text
- Finalize new date for ALC/DLC offsite (No longer October 11) and confirm agenda for this and November 8

5. Potential issues/risks to flag

- Clearances: Requirements for complete BI and inability to use a provisional clearance may inhibit engagement from Ogilvy partners, who already work with CBP but are not required to have a completed BI on their other contract. Their paperwork has been submitted, but are awaiting clearance.

6. Planned leave

WEEKLY STATUS REPORT - Week Ending October 5

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: October 1, 2018

Title/Topic: ALC Meeting

Participants: Kevin McAleenan, Commissioner; Robert Perez, Deputy Commissioner; (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Agreed to list of 22 potential strategic initiatives and prioritized 12 for CBP strategy

Date: October 2, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for workforce resilience

Date: October 3, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for Border Security

Date: October 3, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for Trade

Date: October 3, 2018

Title/Topic: Meeting with OIT team

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for technology

Date: October 3, 2018

Title/Topic: Interview with XD (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for technology

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed editing/clearance process for strategy

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Identified additional contacts in OFO to meet with on specific programs

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined ideas on OneCBP initiative

Date: October 4, 2018

Title/Topic: Meeting to Discuss Strategy Work and COO Workstream

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Align on how two teams will communicate on complementary work

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for technology

Date: October 4, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for technology

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan to share feedback with ALC members

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined baseline and metrics for border security

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed DHS policy planning guidance

Date: October 4, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed leadership opportunities in the agency

Date: October 5, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed outcomes from ALC

Date: October 5, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed initiative outcomes and current metrics

2. Activities conducted this week

- Confirmed broader set of 22 initiatives and prioritized down to 12 with the ALC
- Aligned on a path forward with (b) (6), (b) (7)(C) for C1 and ALC engagement
- Further refined baselines and metrics through interviews with ACs, DACs, Chiefs and working team
- Confirmed offsite date Oct. 22 (half day) with EACs/DEACs and aligned on objectives/agenda
- Completed three options for overall strategy one-pager to share with ALC

3. Planned meetings for next week

Tuesday, 10/9

9:30-10:00am – Project Check-in with (b) (6), (b) (7)(C)

10:00am-3:00pm - Site visit to Harper's Ferry

Wednesday, 10/10

9:30-10 – Interview with (b) (6), (b) (7)(C) Director of Integrated Planning

11:00-12:00 - Interview w/ AC (b) (6), (b) (7)(C)

Thursday, 10/11

2:30-3:00pm - Interview with XD (b) (6), (b) (7)(C), (b) (7)(E)

3:30-4:30pm - Interview with DEAC OT (b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- Refine 2-page initiative synopses, with metrics, baselines, and targets to facilitate Oct. 22 workshop
- Refine strategy one-pager
- Begin drafting strategy text
- Prepare for logistics/facilitation of Oct. 22 offsite

5. Potential issues/risks to flag

- Clearances: Requirements for complete BI and inability to use a provisional clearance may inhibit engagement from Ogilvy partners, who already work with CBP but are not required to have a completed BI on their other contract. Their paperwork has been submitted, but are awaiting clearance.

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending October 12

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: October 9, 2018

Title/Topic: Visit to ATC

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Planned logistics for Nov. 8-9 CBP Leadership Conference

Date: October 10, 2018

Title/Topic: Weekly Strategy Team Check In

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan for the week

Date: October 10, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on overall strategy options

Date: October 10, 2018

Title/Topic: Interview with AC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Learned about governance challenges for strategy

Date: October 10, 2018

Title/Topic: Interview with XD (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined metrics for strategic initiatives

Date: October 11, 2018

Title/Topic: Interview with XD (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined metrics for strategic initiatives

Date: October 11, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined metrics for strategic initiatives

Date: October 11, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Received feedback on overall strategy options

Date: October 11, 2018

Title/Topic: Interview with XD (b) (6), (b) (7)(C)
Participants: (b) (6), (b) (7)(C)
Description/Outcome/Actions: Refined metrics for strategic initiatives

Date: October 11, 2018

Title/Topic: Interview with DEAC (b) (6), (b) (7)(C)
Participants: (b) (6), (b) (7)(C)
Description/Outcome/Actions: Received feedback on overall strategy options

Date: October 12, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C) re: feedback
Participants: (b) (6), (b) (7)(C)
Description/Outcome/Actions: Refined metrics for strategic initiatives

2. Activities conducted this week

- Assessed ATC facilities in Harper's Ferry in preparation for Nov. 8 SES leadership offsite
- Further refined initiatives, baselines, and metrics through interviews with ACs, DACs, Chiefs and working team
- Tested three options for overall strategy one-pager with EACs in 1:1's

3. Planned meetings for next week

Monday 10/15

EAC (b) (6), (b) (7)(C) Enterprise Services
(b) (6), (b) (7)(C) Deputy Director, USBP Planning Division

Tuesday 10/16

Weekly Project Check In
(b) (6), (b) (7)(C) AC Intelligence/ Operations Support and (b) (6), (b) (7)(C) Specialist
Deputy Chief (b) (6), (b) (7)(C) USBP
EAC (b) (6), (b) (7)(C) AMO

Wednesday 10/17

Planning for Nov. 8 CBP Leadership Offsite
EAC (b) (6), (b) (7)(C) OS
(b) (6), (b) (7)(C)
Working team
Deputy Commissioner Perez
EAC (b) (6), (b) (7)(C) OT

Thursday 10/18

DAC (b) (6), (b) (7)(C) International Affairs/Operations Support, AC (b) (6), (b) (7)(C) Internal Affairs/ Operations Support

4. Planned activities/objectives for next week

- Finalize 3-page initiative overviews and test with working group to facilitate Oct. 22 workshop
- Continue drafting strategic plan
- Prepare for logistics/facilitation of Oct. 22 offsite
- Align on agenda/facilitation of Nov. 8 with planning team and CoS

5. Potential issues/risks to flag

- Clearances: Need go ahead for Ogilvy team members to start working on contract (they are already working on another CBP contract)

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending October 19

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: October 15, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C) Deputy Director, USBP Planning Division

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined strategic initiative actions and measures

Date: October 15, 2018

Title/Topic: (b) (6), (b) (7)(C) connect regarding OFO Transit Flow Process and Data

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined strategic initiative actions and measures

Date: October 15, 2018

Title/Topic: (b) (6), (b) (7)(C) meeting with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined strategic initiative actions and measures

Date: October 15, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 15, 2018

Title/Topic: Interview with DEAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 16, 2018

Title/Topic: (b) (6), (b) (7)(C) HRM Team Call

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined strategic initiative actions and measures

Date: October 16, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 16, 2018

Title/Topic: Strategy Discussion with AC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined initiative actions and measures

Date: October 16, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)
Description/Outcome/Actions: Refined initiative actions and measures

Date: October 16, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C) Deputy Chief

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 16, 2018

Title/Topic: Meeting regarding Analytics

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined initiative actions and measures

Date: October 16, 2018

Title/Topic: Meeting with Chief of Staff

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan for C1 meeting

Date: October 17, 2018

Title/Topic: Call between (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined initiative actions and measures

Date: October 17, 2018

Title/Topic: Leadership Conference Preparation Session

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Brainstormed ideas for Nov. 8-9 leadership conference

Date: October 17, 2018

Title/Topic: Interview with DEAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 17, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 17, 2018

Title/Topic: Strategy Working Team Meeting

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined initiative actions and measures

Date: October 17, 2018

Title/Topic: Meeting between (b) (6), (b) (7)(C) and McKinsey team

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on path to working together, identified next steps for clearances and building access

Date: October 17, 2018

Title/Topic: Interview with Deputy Commissioner Perez

Participants: (b) (6), (b) (7)(C) Robert Perez
Description/Outcome/Actions: Discussed three overall strategy options

Date: October 18, 2018

Title/Topic: Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussed three overall strategy options

Date: October 18, 2018

Title/Topic: Meeting with Chief of Staff

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan Oct. 22 top team session

Date: October 18, 2018

Title/Topic: Interview with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Refined strategic initiative actions and measures

Date: October 18, 2018

Title/Topic: C1 update

Participants: (b) (6), (b) (7)(C) Commissioner McAleenan,
(b) (6), (b) (7)(C)

Description/Outcome/Actions: Reviewed three strategy options and aligned on path forward for Oct. 22 top team working session

2. Activities conducted this week

- Finalized overall strategy one-pager and initiatives, measures, baselines, and targets for October 22 top team workshop
- Further refined strategy materials through interviews with C1, ACs, DACs, COO, Chiefs and working team
- Aligned with broader team (e.g., Partnership for Public Service) on objectives and agenda for Nov 8-9 leadership offsite

3. Planned meetings for next week

Monday 10/22

CBP Top team workshop

Tuesday 10/23

Weekly Project Check In with (b) (6), (b) (7)(C)

Wednesday 10/24

Strategy Working Team Meeting

4. Planned activities/objectives for next week

- Reach key decisions on CBP strategy – overall framing, initiative outcomes, measures and owners in top team workshop
- Complete draft of strategic plan
- Prepare for logistics/facilitation of Nov leadership offsite

5. Potential issues/risks to flag

- Clearances:

6. Planned leave

- ...

WEEKLY STATUS REPORT - Week Ending October 26

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: October 23, 2018

Title/Topic: Weekly Check In

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan for the week

Date: October 24, 2018

Title/Topic: Leadership Conference planning

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Aligned on plan for Nov. 8-9 Leadership Conference

2. Activities conducted this week

- Drafted strategy document (full text vertical)
- Rescheduled top team session to Nov. 1 and further refined measures
- Drafted communications and performance mgmt. materials for Nov. 6 ALC
- Planned strategy session and overall communications engagement for Nov. 8 Leadership Conference

3. Planned meetings for next week

Monday 10/29

2:30-4:00pm Leadership Conference planning

Tuesday 10/30

9:00-12:00pm Baltimore port visit

Wednesday 10/31

2:30-3:30pm Meeting with HRM (b) (6), (b) (7)(C)

TBC – Meeting with CoS

Thursday 11/1

11:30-3:30pm Top Team workshop (C1, C2, COO, EACs, DEACs)

4. Planned activities/objectives for next week

- Reach decisions on strategic framework, outcomes, measures and owners for 12 strategic initiatives
- Finalize plan/materials for communications and performance management for Nov. 6 ALC
- Finalize materials, logistics and facilitation for Nov. 8 leadership offsite
- Refine strategy document and begin formatting with graphics team

5. Potential issues/risks to flag

6. Planned leave

WEEKLY STATUS REPORT - Week Ending November 2

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: October 29, 2018

Title/Topic: Leadership Conference Follow-up

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Coordination meeting to discuss the Leadership Offsite (*rescheduled to January*)

Date: October 30, 2018

Title/Topic: Guidehouse Meeting

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: McKinsey/Guidehouse meeting to discuss project and path forward with Guidehouse.

Date: November 1, 2018

Title/Topic: Guidehouse Follow Up

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Guidehouse kick-off with McKinsey and client

2. Activities conducted this week

- Coordinated materials, logistics, and facilitation for Nov 8.
- Refined strategy document (full text vertical) and 1-pager graphical framework, with graphics formatting team
- Refined possible measures for 12 strategic initiatives
- Completed project on-boarding with Guidehouse with plan on communications and performance management

3. Planned meetings for next week

Date: [TBC] November 5, 2018

Title/Topic: Meeting with McKinsey and Guidehouse, for further on-boarding and coordination

Date: November 6, 2018

Title/Topic: Meeting with HRM (b) (6), (b) (7)(C)

Date: [TBC] November 7, 2018

Title/Topic: Meeting with McKinsey, Guidehouse, and (b) (6), (b) (7)(C) (Ogilvy TBC)

Date: [TBC] November 9, 2018

Title/Topic: Meeting with McKinsey, Guidehouse, (b) (6), (b) (7)(C) and CBP Working Team

4. Planned activities/objectives for next week

- Develop considerations/templates for initiative “ownership” and performance management
- Prepare Guidehouse and Ogilvy for their work: review initiatives, initiative maturity, and background materials
- Prepare working team for transition to performance management planning; solicit feedback/discussion on communications approach to the workforce, across different components

5. **Potential issues/risks to flag**

6. **Planned leave**

McKinsey & Company

WEEKLY STATUS REPORT - Week Ending November 9

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: November 6, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to discuss updates on strategy work, as well as approach to HRM-specific initiatives

Date: November 7, 2018

Title/Topic: OPA Support to Leadership Off-site

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussion re: OPA communications support to January Leadership Off-site

Date: November 7, 2018

Title/Topic: Guidehouse Meeting

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: McKinsey/Guidehouse meeting to discuss strategic initiatives, and project workplan

Date: November 8, 2018

Title/Topic: Follow-up re: measures and metrics for strategy work

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to discuss implementation plan considerations: measures and metrics for strategy work

Date: November 8, 2018

Title/Topic: Working team meeting re: current/pending steps and next steps

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Working team meeting to discuss: current state of strategic planning & initiatives; workplan ahead; questions and next steps.

2. Activities conducted this week

- Develop considerations/templates for initiative “ownership” and performance management
- Prepare Guidehouse and Ogilvy for their work: review initiatives, initiative maturity, and background materials
- Prepare working team for transition to performance management planning; solicit feedback/discussion on communications approach to the workforce, across different components

3. Planned meetings for next week

Date: November 13, 2018

Title/Topic: Follow-up re: planning for OPA Support to Leadership Offsite

Date: November 13, 2018

Title/Topic: HRM Follow-up with McKinsey re: Strategic initiatives

Date: November 14, 2018

Title/Topic: CBP Strategy: Working/roll-up-the-sleeves session with McKinsey, Guidehouse, Ogilvy, and (b) (6), (b) (7)(C)

Date: [TBC] November 15, 2018

Title/Topic: Working team meeting

4. Planned activities/objectives for next week

- Guidehouse to continue work on developing considerations for initiative ownership and performance management
- Continue to prepare working team for transition to performance management planning; refine strategic initiative actions; solicit feedback/discussion on communications and branding approach to the workforce, across different components
- Refine draft written (vertical) strategy document

5. Potential issues/risks to flag

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending November 16

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: November 13, 2018

Title/Topic: Meeting with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Follow-up meeting to discuss updates on strategy work, as well as approach to HRM-specific initiatives

Date: November 14, 2018

Title/Topic: CBP Strategy: Working/roll-up-the-sleeves session

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Follow-up meeting to discuss ownership and implementation planning approach

Date: November 15, 2018

Title/Topic: Discussion on Measures/Metrics

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Discussion on how CBP/DHS currently thinks about measures/metrics, and how best to message performance management (implementation planning) in the planning for strategy/annual planning

Date: November 16, 2018

Title/Topic: Working team meeting

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Working team meeting to discuss: refinements to strategic initiative actions/outcomes; discussion on portfolio of initiatives

2. Activities conducted this week

- Guidehouse developed considerations for initiative ownership and performance management
- Working team began transition to implementation planning; refined strategic initiative actions and provided considerations for implementation planning; discussed next steps on portfolio of initiatives
- Refine draft written (vertical) strategy document; delivered to (b) (6), (b) (7)(C) for review

3. Planned meetings for next week

Date: November 19, 2018

Title/Topic: Follow-up re: planning for transition to implementation/communications planning

Participants: (b) (6), (b) (7)(C)

Date: November 19, 2018

Title/Topic: Follow-up re: communications and branding planning

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: November 20, 2018

Title/Topic: Follow-up re: measures and metrics

Participants: (b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- Guidehouse/McKinsey schedule update meetings with EACs
- Follow-up and coordination meeting with performance management division for input into measures/metrics
- Guidehouse completes communications and implementation planning; socializes with broader team for input/refinement
- Guidehouse schedules working team meeting for week following Thanksgiving, re: communications approach and audience; sends out pre-read/thought materials prior to holiday

5. Potential issues/risks to flag

6. Planned leave

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WEEKLY STATUS REPORT - Week Ending November 23

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: November 19, 2018

Title/Topic: Final Knowledge Transfer with Guidehouse

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Final meeting to discuss hand off of main project focus from McKinsey to Guidehouse.

Date: November 19, 2018

Title/Topic: Branding/Strategy Integration

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to discuss the current status of Ogilvy's branding work, and the ways in which it can be integrated into Strategy communication efforts.

Date: November 21, 2018

Title/Topic: Follow-on Discussion on Measures/Metrics

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Continued discussion on measures/metrics, as well as reporting templates and formats.

2. Activities conducted this week

- Guidehouse worked with WRED to schedule follow-up meeting to determine how to integrate Strategy efforts with ongoing FEVS activities.
- Guidehouse developed draft questions and schedule for stakeholder listening sessions.
- McKinsey refined strategic initiative actions based on feedback and considerations provided by the Working Team.

3. Planned meetings for next week

Date: November 26, 2018

Title/Topic: Meeting with EAC (b) (6), (b) (7)(C) (prep for Dec. 4 CBP strategy discussion)

Participants: EAC (b) (6), (b) (7)(C)

Date: November 27, 2018

Title/Topic: Strategy/PPBA Integration

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: November 29, 2018

Title/Topic: Integration with WRED FEVS Activities

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: November 30, 2018

Title/Topic: Meeting with C2 (prep for Dec. 4 CBP strategy discussion)

Participants: C2, (b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- Guidehouse/McKinsey to facilitate meetings with EACs and refine read ahead for 12/4 Top Team meeting accordingly.
- Guidehouse/McKinsey to meet with PPBA POCs to further define how the strategy will integrate into FY20 (and beyond) planning.
- Guidehouse to meet with WRED to understand how and to what degree to integrate strategy and FEVS activities.
- Guidehouse to complete communications and implementation plan outlines; will socialize with (b) (6), (b) (7)(C) for input/refinement.
- Guidehouse to schedule remaining stakeholders listening sessions.
- Guidehouse and Ogilvy to further plan for the Message Workshop(s) and present to (b) (6), (b) (7)(C) for input/refinement.

5. Potential issues/risks to flag

6. Planned leave

- Guidehouse team is not working 11/22 and 11/23 for the Thanksgiving holiday (note: (b) (6), (b) (7)(C) is local should any issue come up)

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WEEKLY STATUS REPORT - Week Ending November 30

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: November 26, 2018

Title/Topic: Meeting with EAC (b) (6), (b) (7)(C) (prep for Dec. 4 CBP strategy discussion)

Participants: EAC (b) (6), (b) (7)(C)

Date: November 27, 2018

Title/Topic: Strategy/PPBA Integration

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to discuss how the 12 Strategic Initiatives will integrate into the UFR and RAP processes.

Date: November 29, 2018

Title/Topic: Prep with DEAC (b) (6), (b) (7)(C) for 12/4 Strategy Session

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review materials for 12/4 ALC Strategy Discussion and answer questions as needed.

Date: November 29, 2018

Title/Topic: Prep with EAC (b) (6), (b) (7)(C) for 12/4 Strategy Session

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review materials for 12/4 ALC Strategy Discussion and answer questions as needed.

Date: November 29, 2018

Title/Topic: Prep with EAC (b) (6), (b) (7)(C) or 12/4 Strategy Session

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review materials for 12/4 ALC Strategy Discussion and answer questions as needed.

Date: November 29, 2018

Title/Topic: Integration with WRED FEVS Activities

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to discuss how McKinsey/Guidehouse can work with WRED to gather information from FEVS data and conduct listening sessions to be used in the Communications and Implementation Plans.

Date: November 30, 2018

Title/Topic: Strategy Session with C2 Robert Perez

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review materials for 12/4 ALC Strategy Discussion and answer questions as needed.

Date: November 30, 2018

Title/Topic: Strategy Session with (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review materials for 12/4 ALC Strategy Discussion and answer questions as needed.

2. Activities conducted this week

- Guidehouse developed draft outlines for the Communications and Implementation Plans.
- McKinsey/Guidehouse conducted listening sessions with DEAC (b) (6), (b) (7)(C) EAC (b) (6), (b) (7)(C) EAC (b) (6), (b) (7)(C) and C2 Robert Perez.
- McKinsey refined strategic initiative actions based on feedback and considerations provided by the Working Team and (b) (6), (b) (7)(C)

3. Planned meetings for next week

Date: December 4, 2018

Title/Topic: Workshop with CBP senior leadership team (e.g., C1, C2, COO, EACs, and DEACs) to achieve three objectives:

- 1) Decide on strategy overview (e.g., 1 page)
- 2) Decide on outcomes for 12 strategic initiatives
- 3) Decide on owners for each initiative

Participants: C1, C2, COO, EACs, DEACs, (b) (6), (b) (7)(C)
(b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- McKinsey to facilitate workshop with CBP senior leadership team and refine materials based on the session
- Guidehouse to follow-up with WRED to understand how and to what degree to integrate strategy and FEVS activities.
- Guidehouse to refine outlines for the Communications and Implementation Plans based on feedback from (b) (6), (b) (7)(C)
- Guidehouse to schedule remaining stakeholders listening sessions.
- Guidehouse and Ogilvy to further plan for the Message Workshop(s) and present to (b) (6), (b) (7)(C) for input/refinement.

5. Potential issues/risks to flag

6. Planned leave

- N/A

WEEKLY STATUS REPORT - Week Ending December 14

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: December 11, 2018

Title/Topic: CBP Strategy – Project Check-in Call

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Met to review the Implementation Outline and documented feedback to incorporate in the annotated outline.

Date: December 12, 2018

Title/Topic: CBP Strategy Discussion – AC (b) (6), (b) (7)(C)

Participants: AC (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with AC (b) (6), (b) (7)(C) to provide update on the strategy efforts, understand OPA's timelines for communications, and identify who the team can coordinate with to communicate the strategy internally and externally to CBP.

Date: December 12, 2018

Title/Topic: CBP Strategy – Working Team

Participants: Working Team, (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with the Working Team to provide update on the strategy and to gather input on preferred communications channels and approaches to communicate the strategy to the field.

Date: December 13, 2018

Title/Topic: CBP Strategy Schedule Discussion

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Identified key milestones and dates for finalizing the strategy

Date: December 13, 2018

Title/Topic: CBP Strategy Discussion – (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with (b) (6), (b) (7)(C) to gather input on preferred communications channels and approaches to communicate the strategy to the field.

Date: December 13, 2018

Title/Topic: CBP Strategy Discussion – (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with (b) (6), (b) (7)(C) to gain understanding of grievances the union receives to better inform messaging of the CBP strategy.

Date: December 14, 2018

Title/Topic: CBP Strategy Discussion – XD (b) (6), (b) (7)(C)

Participants: XD (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with XD (b) (6), (b) (7)(C) to gather input on preferred communications channels and approaches to communicate the strategy to the field.

Date: December 14, 2018

Title/Topic: CBP Strategy Discussion – OCA

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with OCA to understand key congressional stakeholders and how to communicate the strategy to key stakeholders.

Date: December 14, 2018

Title/Topic: CBP Strategy Discussion – Chief of Staff

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Reviewed example write-ups for the strategic initiatives, selected a preferred approach and discussed the path forward

Date: December 14, 2018

Title/Topic: CBP Strategy Discussion – Messaging

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Met with Ogilvy to provide status update on strategy efforts and discuss messaging workshop and themes for key messages.

2. Activities conducted this week

- Guidehouse continued to refine Stakeholder Mapping to identify the level of influence/impact of internal and external stakeholders.
- Guidehouse met with the communications POCs identified from the listening sessions with the EACs.
- McKinsey/Guidehouse met with (b) (6), (b) (7)(C) and (b) (6), (b) (7)(C) to review the draft Implementation Plan Outline.
- Guidehouse met with Ogilvy to provide a status update and discuss next steps for the Messaging Workshop and also discuss key themes for messaging the strategy.

3. Planned meetings for next week

Date: December 18, 2018 (tentative)

Title/Topic: CBP Strategy – Communications and Messaging

Participants: (b) (6), (b) (7)(C)
(b) (6), (b) (7)(C)

Date: December 18, 2018

Title/Topic: CBP Strategy – Project Check-in – Annotated Outlines

Participants: (b) (6), (b) (7)(C)
(b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- McKinsey to revise draft strategy based on agreed upon example initiative
- McKinsey/Guidehouse to facilitate meetings with communications POCs to identify communication channels and preferred communication approaches as well as initiative leads
- Guidehouse and Ogilvy to meet with (b) (6), (b) (7)(C) to discuss key messages for strategy.
- Guidehouse/McKinsey to meet with (b) (6), (b) (7)(C) to review annotated Communications and Implementation Plan outlines.
- Guidehouse to continue to refine stakeholder mapping based on feedback receiving from strategy discussions and communications POCs.
- Guidehouse to schedule remaining communications POCs identified by leadership.
- Guidehouse and Ogilvy to further plan for the Message Workshop(s) and present to (b) (6), (b) (7)(C) for input/refinement.

5. Potential issues/risks to flag

6. **Planned leave**

- N/A

McKinsey & Company

WEEKLY STATUS REPORT - Week Ending December 7, 2018

Base BPA #HSBP1017A00024

Task Order #3 – Strategic Plan

1. Meetings attended this week

Date: December 4, 2018

Title/Topic: CBP Strategy Workshop with Leadership Team

Participants: Deputy Commissioner Perez, (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Reached the following decisions (1) to recommend to C1 strategy one-pager (option A) as the best way to depict the one-page overview of the strategy, agreed upon the 12 initiatives to be included, and confirmed the three categories of Mission, Team, and Future; and (2) group decided on owners for each initiative.

Date: December 6, 2018

Title/Topic: Review Draft Outline of the Communications and Implementation Plans for CBP Strategy

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting to review draft outlines for the Communications and Implementation Plans.

Date: December 7, 2018

Title/Topic: Message Workshop

Participants: (b) (6), (b) (7)(C)

Description/Outcome/Actions: Meeting with Ogilvy to provide status update on effort and recommendations for the messaging workshop.

2. Activities conducted this week

- Guidehouse conducted Stakeholder Mapping to identify the level of influence/impact of internal and external stakeholders.
- Guidehouse scheduled meetings with the communications POCs identified from the listening sessions with the EACs. Meetings scheduled for the week of December 10.
- McKinsey/Guidehouse met with (b) (6), (b) (7)(C) to review the draft outlines for the Communications and Implementation Plans.
- Guidehouse met with Ogilvy to provide a status update and discuss next steps for the Messaging Workshop.
- McKinsey refined strategic initiative actions based on feedback and considerations provided by the ALC.

3. Planned meetings for next week

Date: December 10, 2018

Title/Topic: CBP Strategy – Interview with EAC (b) (6), (b) (7)(C)

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: December 11, 2018

Title/Topic: CBP Strategy – Working Team Meeting

Participants: Working Team, (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: December 13, 2018

Title/Topic: CBP Strategy – Communications Discussion

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: December 13, 2018

Title/Topic: CBP Strategy – Communications Discussion

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

Date: December 14, 2018

Title/Topic: CBP Strategy – Communications Discussion

Participants: (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

4. Planned activities/objectives for next week

- McKinsey to revise initiatives based on Dec. 4th workshop input (descriptions, activities, outcomes, and metrics) in Word document to be sent to owners along with a checklist and supporting materials to start implementation planning
- McKinsey to send additional framing options for strategy one-pager
- McKinsey/Guidehouse to facilitate meetings with communications POCs to identify communication channels and preferred communication approaches.
- Guidehouse to develop annotated outlines for the Communications and Implementation Plans based on feedback from (b) (6), (b) (7)(C)
- Guidehouse to schedule remaining stakeholders listening sessions.
- Guidehouse and Ogilvy to further plan for the Message Workshop(s) and present to (b) (6), (b) (7)(C) for input/refinement.

5. Potential issues/risks to flag

6. Planned leave

- N/A